

Creating Email Templates

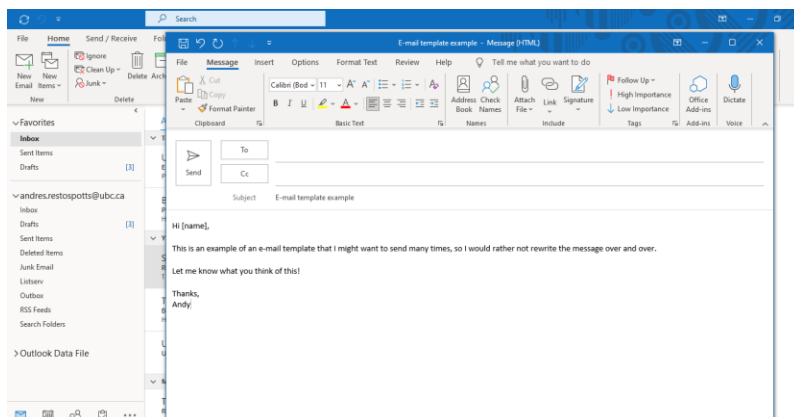
Purpose

Creating a Template will make responding to common messages much faster and easier, while lessening mistakes as well as clutter in your Drafts folder.

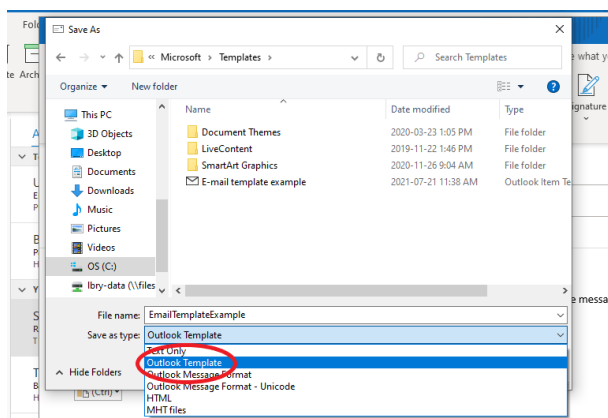
Thinking about what Templates you may need and why will also help to understand how you can better categorize your emails messages and workflow, promoting a cohesive personal email management system.

Walkthrough

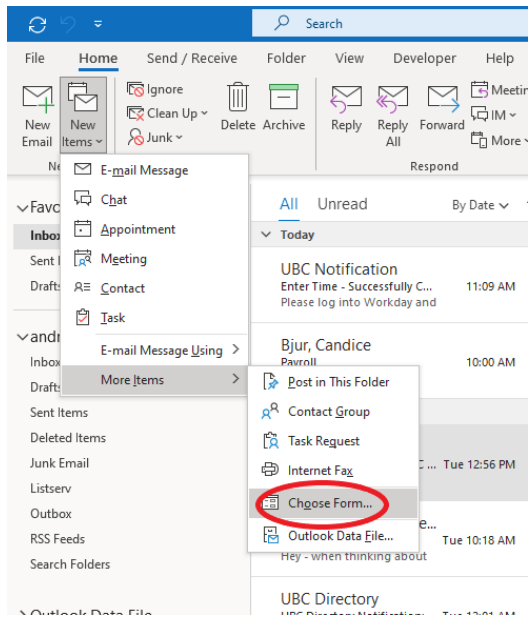
1. First, compose a new email message that you would like to use as the template.



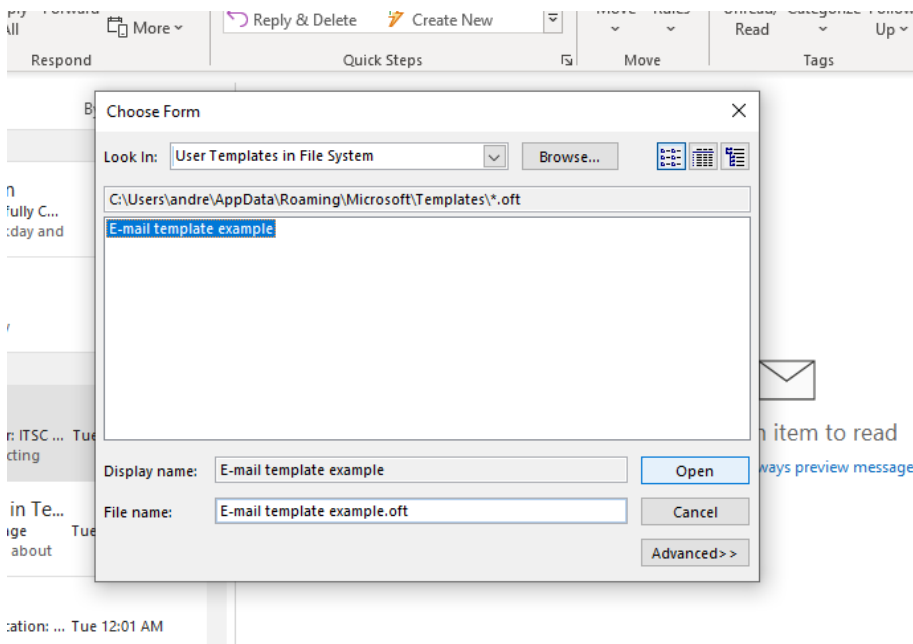
2. Go to File – Save As, and under “Save as type” select “Outlook Template”. Give the template a clear name and save. By default they will be saved locally to your device, so if you wish to access the template from another location, make sure to save it to a shared network folder.



3. To use the template, select “New Items”, then choose “More Items” and “Choose Form”.



4. This will bring up a dialogue box where you can select various forms to use. In the drop-down menu at the top (“Look In”), select “User Templates in File System”. This should bring up your saved templates. Select the one you would like to use and click “Open”. Then simply fill in the gaps of the message (To: field, names, etc.).



Note

MS Outlook's default "Drafts" folder is often used as a place to keep what are essentially templates. However, drafts – as transitory information – are meant to be destroyed 90 days after their creation, and this could cause workflow issues.

See the [Default Folders](#) info sheet for more information.

